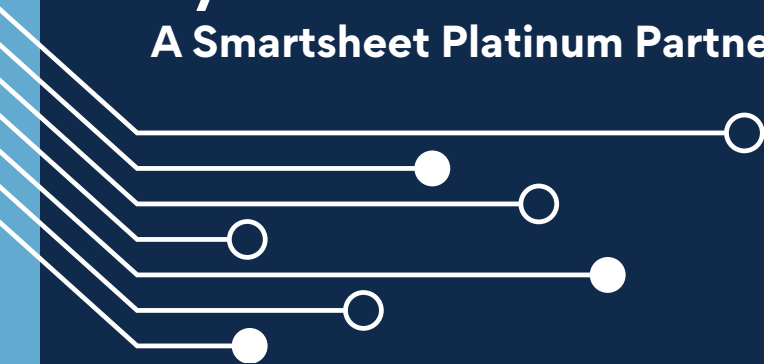


# The Ultimate Smartsheet Guide 2024



**By CloudWave**

**A Smartsheet Platinum Partner**



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# Key Benefits to Organizing Data with Smartsheet

There are dozens of cloud-based tools on the market to help you organize data and streamline workflows.

But if your business is used to old-school methods like totalling up numbers in an Excel sheet from a hand-held calculator, migrating all of your siloed data into one place and learning a new software system might seem intimidating at first.

One of the reasons our team at CloudWave has invested time and resources into becoming a Smartsheet Platinum Partner is because of the value it provides to our clients.

Fast access to reliable data and automated workflow and reporting procedures can be transformative for businesses: both in their earning potential, and in retention as employees suffer less from burnout completing tedious data-related tasks by hand.

Here are five key benefits to organizing data with Smartsheet that you should consider as you compare cloud-based solutions for your business.



## 1. Your team can collaborate better.

If you've worked extensively in software like Excel, then you probably already have a laundry list of frustrations with the limitations. Only one person can update and edit a spreadsheet at a time, and it's difficult or impossible to track who made what changes.

Smartsheet's collaborative functionality allows for:

- Multiple people editing and saving changes to a sheet at the same time.
- Easy auditing of cell-level and sheet-level changes.
- Conversations within a sheet.
- Easy ways for people outside of the sheet to make changes as needed.

When collaboration is simplified, manual errors are reduced and your data

integrity is stronger. Plus, less headache and wasted time for your team improves morale and productivity.



## 2. Your visibility into data insights is improved.

Smartsheet is equipped with features that make it simple for the right people to get the right information. Customizable sharing permission levels allow people to have different access based on only the data they actually need to use. This improves security and efficiency.

Within Smartsheet's reporting functionality, you can combine multiple sheets and filter down to just the subset you need to see. Dashboards can surface KPI metrics, specific reports, and more so that you can track progress at a glance.

Publishing options allow you to share sheets, reports, and dashboards

with people in or outside your Smartsheet organization either through live read-only links or embedded code.

With greater data visibility comes improved insights. Having easy access to reporting data you can trust is a game changer when planning ahead for the next quarter or even the next few weeks.



### **3. Your employees can save time on routine tasks.**

Smartsheet makes crucial manual processes work easier and faster. You can organize your sheets, reports, and dashboards into workspaces and folders. This combined with Smartsheet improved search functionality helps you quickly find exactly what you need.

You can easily collect data using forms that directly

populate sheets, send emails straight from sheets, and even use automation to streamline workflows.



### **4. You can eliminate the need to duplicate work in multiple platforms.**

Thanks to Smartsheet's robust integration capabilities, you can solve employee frustrations around duplicated work.

Sheets can connect to Resource Management using the sheet panel integration. Smartsheet connectors are available for Jira, Salesforce, and Microsoft Dynamics 365, allowing for a bidirectional flow of data between Smartsheet and the other platform.

Smartsheet's Bridge is a no code platform that allows for easy integration with a variety of other systems,

like FedEx, ServiceNow, Sharepoint and more.

If none of the out of the box options meet your needs, Smartsheet's extensive API allows for custom integrations so that you can connect to any software system.



## **5. The software is versatile enough to fit any business model.**

Smartsheet is a great choice for any company, regardless of the industry you serve. It can accommodate in-office, hybrid, and remote work environments with ease.

Businesses in a wide variety of sectors utilize Smartsheet to organize data: manufacturing, finance, marketing, technology and beyond. It can be utilized for virtually any type of project - traditional PMO, agile,

and other ad hoc use cases. Without the limitations of industry-specific software, you can more easily adjust or pivot as needed to keep up with modern digital trends and continue to make your work environment more user-friendly and accessible to employees.

## **Organizing Data with Smartsheet and CloudWave**

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If you're considering Smartsheet for project management and data analysis, look for a Smartsheet Platinum Partner like CloudWave who understands the technology best practices and prioritizes your unique business needs.

Through Smartsheet integration, we deliver cross-platform functionality that helps you bring your system together for an end-to-end solution within Smartsheet. Using automation, we reduce tedious manual processes to save time and improve productivity.

# Project Management Formulas to Leverage in Smartsheet



When it comes to project management, everyone knows efficiency and organization are crucial to ensure successful project delivery. To streamline and optimize your project workflows in Smartsheet, leveraging the right formulas can be a game-changer. Here we will explore five essential project management formulas that can help you harness the full potential of Smartsheet: ANCESTORS, CHILDREN, PARENT, ISCRITICAL, and NETWORKDAYS.

## 1. ANCESTORS Formula

In project management systems, tasks are often interdependent and organized in hierarchical structures. The ANCESTORS Formula enables you to traverse upwards in this hierarchy, providing you with valuable insights into a task's lineage and dependencies.

When planning complex projects, understanding the ancestors of a specific task is crucial for identifying its dependencies and potential bottlenecks. By applying the ANCESTORS formula, you can access essential information about the parent tasks or even grandparent tasks, allowing you to track the progress and implications of each activity.

## 2. CHILDREN Formula

Just as the ANCESTORS formula allows you to explore tasks' dependencies upwards in the hierarchy, the CHILDREN formula empowers you to delve deeper into the tasks' subordinate elements. This formula is instrumental in obtaining a comprehensive overview of all the subtasks associated with a specific parent task.

By leveraging the CHILDREN formula in Smartsheet, project managers can monitor the status of each subtask and gauge their collective impact on the overall project timeline. This knowledge can be leveraged to make informed decisions and effectively allocate resources for task completion.

## 3. PARENT Formula

As the backbone of project management, the PARENT formula allows you to identify the parent task of a given subtask within your project. By doing so, you can efficiently track and manage the relationships between tasks and their corresponding parent tasks.

The PARENT formula's insights offer a holistic perspective, enabling you to understand how changes to a subtask might impact its parent task and, consequently, the overall project. This feature proves especially valuable when managing large-scale projects with multiple interconnected tasks.

## 4. ISCRITICAL Formula

In any project, certain tasks are more critical than others in determining the project's overall timeline. The ISCRITICAL formula in Smartsheet evaluates each task criticality based on its dependencies and the effect any delays might have on the project's completion date.

By identifying critical tasks using the ISCRITICAL formula, project managers can focus their efforts on ensuring these activities stay on track, reducing the risk of project delays. This knowledge can guide project managers in prioritizing resources and allocating them effectively to meet crucial deadlines.



## 5. NETWORKDAYS Formula

Project timelines are often constrained by external factors like weekends, holidays, and non-working hours. The NETWORKDAYS formula in Smartsheet calculates the number of working days between two specified dates, taking into account the non-working days.

This formula is immensely beneficial for establishing realistic project timelines and managing expectations. By incorporating NETWORKDAYS into your Smartsheet workflows, you can accurately estimate project durations, set milestones, and communicate feasible deadlines to stakeholders.

# Check Out Our Smartsheet Formula Series on YouTube

Our Smartsheet experts at CloudWave created step-by-step guides for each of these project management formulas. Learn more at the links below!

**1. ANCESTORS Formula**

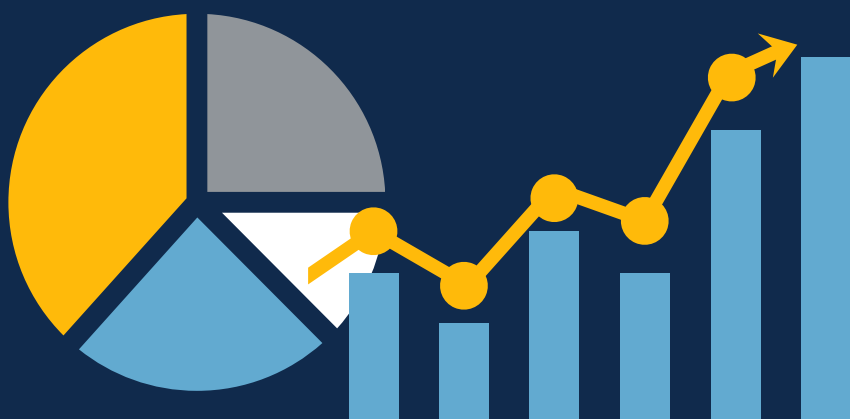
**2. CHILDREN Formula**

**3. PARENT Formula**

**4. ISCRITICAL Formula**

**5. NETWORKDAYS Formula**





# Top Tips for Maximizing Smartsheet Reports

If your business uses Smartsheet for organizing data and tracking information, then you are probably well aware of the exceptional reporting capabilities it has. But if you're a new Smartsheet user, there could be some reporting best practices you're missing that will make your life just a little bit easier.

Here are eight tips for maximizing Smartsheet reports from our team of certified experts at CloudWave.

## **1. Leverage both report types.**

Smartsheet has two report types. Select the report type that will meet your needs: Row Report or Sheet Summary Report. Row Reports will pull in the data within the sheet itself, whereas Sheet Summary is used to aggregate organizational data and capture metrics.

## **2. Explore available views.**

You don't have to use the default Grid view for reports. Depending on your dataset, use the Gantt View to see your project timelines, Calendar View for a weekly or monthly overview of tasks, or the Card View (Row Reports only) for a kanban-style view.

## **3. Utilize collaboration features.**

Attachments, conversations, and proofing are available in both the sheet and report. If you add any of these to the row in a sheet, it will populate on the rows in reports. Likewise, you can add these to rows in a report and they will populate the sheet.

## **4. Rename the primary column.**

When you start a report, the primary column from the sheet will just be called "Primary" in the report, despite what it is named in the sheet. Simply right click on the column in the report and select "Rename Column."

## **5. Customize your report.**

The reports have numerous ways to narrow down and aggregate your data: Filter Criteria, Group, Summarize, and Sort. Using the appropriate combination of these, you can pull only what is needed to the report and arrange the data in a way that is quick and easy to consume.

## 6. Remember the Current User filter.

When customizing your report, if your data has a contact column, you can set a current user filter. This means that whoever is logged into Smartsheet viewing the report will only see the rows they are associated with.

## 7. Add reports to your dashboards.

Reports are great stand alone tools, but you can do even more with them on dashboards! You can link them on a dashboard for easy navigation. You can embed them on a dashboard for visibility. And you can leverage the highest level summary data to fuel dashboard chart widgets.





# Top Tips for Seamless Smartsheet Integration

Smartsheet can work wonders for data management, process automation, and reporting insights for businesses in any industry. But if you already have software systems you rely on for your daily business needs, integrating Smartsheet technology into that flow seamlessly might seem intimidating.

At CloudWave, our experienced Smartsheet consultants understand what it takes to pull off a painless integration that will improve your real-time data access and project workflows instead of leaving you with a headache as you try to juggle multiple software systems. Here are our top eight tips for a seamless Smartsheet integration.



## **1. Start with a thorough discovery phase.**

You know how the old saying goes: if you fail to plan, then you plan to fail. It definitely holds true when it comes to integration projects!

Ensuring that everyone involved understands core objectives for the outcome of the integration and details about how the two systems work separately and together will set your integration up for success. Spend dedicated time making sure both you and your Smartsheet consulting partners understand the existing business processes and the end goal. Start by answering these questions:

- What is the current state?
- What are the pain points that we need to fix in the new solution?
- What are the design and functionality requirements for the new solution?



## **2. Keep timeline and process expectations on the same page.**

Once you've discussed the overall scope of the project, everyone can set expectations about the process and timeline. Make sure both parties are aware of how info will be communicated and when deadlines are coming up.

As a baseline, everyone should agree to both the total projected turnaround time from build to go live, and an ongoing schedule for recurring meetings and demos. Take into consideration how much time is needed for feedback throughout the build.



### **3. Ensure there is leadership buy-in.**

It is critical that the leadership team members who will either oversee the teams who use the solution or will use the solution themselves are involved in the conversations about design and integration process. This helps with adoption and long-term success, as the leadership team can encourage the continued use of the solution long after go-live. The leadership team is also often the team that will ultimately view and leverage reports from your Smartsheet dashboards. Plus, feedback from leadership provides the consultants building the Smartsheet environment with the big picture info they need to create the most helpful solutions for your business, so it is vital that their vision is understood and reflected in the end product.



### **4. Identify a Smartsheet power user.**

Choosing a point person who will master Smartsheet and maintain the system after launch can help the rest of the team adopt the system more successfully. Identify your Smartsheet power user: who on your team will be your solution admin?



### **5. Provide feedback as you go.**

Part of the reason for setting a timeline with built-in meetings and demos as checkpoints throughout the integration process is for your Smartsheet consulting partners to collect your feedback. Ask questions or request changes as you go: use designated meeting times to raise any concerns you have.



## **6. Participate in user acceptance testing.**

Make sure the core user group for the system participates in the user acceptance testing (UAT) phase of the integration. This is a final opportunity to make changes that will improve internal processes, and it solidifies the team's understanding of the new Smartsheet system. The employees who work the most closely to the data and processes that will be integrated with Smartsheet are the most qualified to speak on their existing procedures and pain points.



## **7. Roll out your Smartsheet solution with training.**

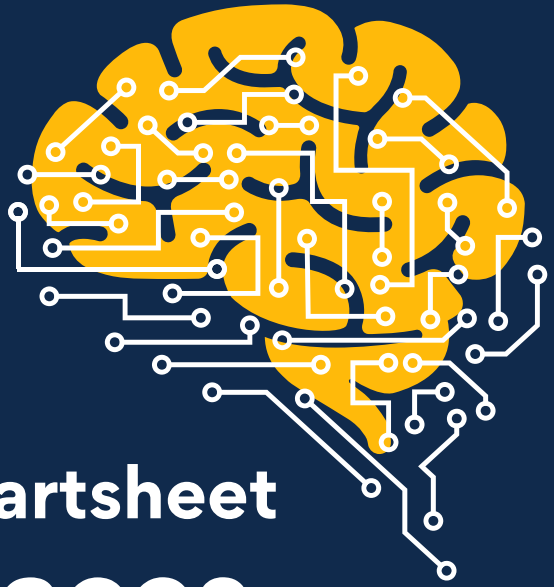
Invest time in properly training system users and especially admins so that your team can fully adopt the new solution while it is still fresh in everyone's minds. This will also ensure that current employees can train new team members as your business continues to grow.



## **8. Work with an experienced Smartsheet integration team.**

While there are thousands of cloud-based technology experts, not all of them are experts specifically in Smartsheet who will understand all of the best practices involved in setting up your system for long-term success. Our CloudWave team has hands-on experience integrating Smartsheet with dozens of different software platforms, including Salesforce, MuleSoft, Google, Azure, Jira, HubSpot, ServiceNow, FedEx, and many more. Even if you are using a software platform without a typical out-of-box integration process, we can customize the environment to flow seamlessly between systems.





# How Smartsheet Embraces Generative AI

In a rapidly evolving digital landscape, companies are continually seeking innovative ways to enhance their products and services to better serve their customers. Smartsheet has recently taken a significant step forward by embracing Generative AI to improve efficiency and user experience.

By incorporating artificial intelligence into its core functionalities, Smartsheet is set to empower its users with advanced capabilities and streamlined workflows, making collaboration and project management more efficient than ever before.



## **Understanding Generative AI**

Generative AI, also known as creative AI, is a subset of artificial intelligence that involves using machine learning algorithms to produce new, original content. Unlike traditional AI systems that follow predefined patterns and rules, generative AI has the ability to create novel output based on patterns it learns from vast datasets.

This technology holds immense potential for transforming various industries and is now finding its way into the realm of project management and work execution.



## **Smartsheet's Vision for Generative AI**

Smartsheet's vision for integrating Generative AI into its platform is to empower users to work smarter, not harder. By leveraging the power of AI, Smartsheet aims to enhance collaboration, automate repetitive tasks, and provide valuable insights to make informed decisions, all while maintaining a user-friendly interface that doesn't overwhelm its users with complexity.

# Smartsheet's Vision for Generative AI

## **Automation**

One of the primary ways Smartsheet is employing Generative AI is by automating repetitive tasks that can often be time-consuming and prone to errors. For instance, with the help of AI-driven automation, users can now generate project timelines, resource allocation, and task dependencies, significantly reducing manual effort and streamlining the project planning process.

Smartsheet's generative AI algorithms can analyze historical data from previous projects, identify patterns, and use this knowledge to generate predictive timelines and resource allocation suggestions. This not only saves time but also ensures that projects are better planned and executed, leading to improved overall efficiency.

## **Collaboration**

Effective collaboration lies at the heart of successful project management, and Smartsheet understands this crucial aspect. With the implementation of Generative AI, Smartsheet's platform will now be able to analyze communication patterns between team members and offer valuable suggestions to enhance collaboration.

For example, the AI-powered system can identify potential bottlenecks in communication flow and recommend more efficient channels for better information dissemination. Also, it can automatically suggest team members with relevant expertise for specific tasks, facilitating a smoother workflow and driving better outcomes.

## **Simplified Formulas**

Leveraging the AI-driven system, users can now effortlessly generate accurate and contextually relevant formulas without the need for in-depth formula syntax knowledge. The new feature intelligently suggests formula options based on data relationships and desired outcomes, streamlining the formula creation process and ensuring greater efficiency.

The AI system goes beyond mere suggestions, auto-completing formulas to reduce errors and uncover formula options users might not have considered. The system continuously learns from user feedback, adapting and improving its capabilities over time. This iterative learning process ensures increasingly accurate and personalized formula suggestions. By simplifying formula creation, Smartsheet propels users towards a future where data complexity becomes an asset, not a hindrance, in their project management and work execution endeavors.

# Smartsheet's Vision for Generative AI

## Data-Driven Decisions

In today's fast-paced business environment, making informed decisions is paramount to stay ahead of the competition. Smartsheet's Generative AI takes data analysis to new heights by providing users with intelligent insights and actionable recommendations based on historical data and ongoing project performance.

By analyzing data patterns, the AI system can forecast potential risks, evaluate the impact of different decisions, and suggest optimal courses of action. This enables project managers and stakeholders to make well-informed decisions, resulting in improved project outcomes and better overall project governance.

## User-Friendly Interface

While incorporating advanced AI capabilities, Smartsheet remains committed to maintaining a user-friendly interface. Users can chat with a readily available AI help bot if they run into questions or confusion within the platform. This AI assistant can provide immediate, on screen guidance for Smartsheet-related topics such as how to create a workspace, how to add collaborators, help finding the right template, choosing the best formula, and more.

The interface design ensures that users can seamlessly integrate AI-generated insights and recommendations into their existing workflows without feeling overwhelmed by the technology.





# The Future of AI with Smartsheet

As Smartsheet embraces Generative AI to improve user experience, the platform is poised to usher in a new era of productivity and efficiency. By automating repetitive tasks, enhancing collaboration, providing intelligent insights, and preserving its user-friendly interface, Smartsheet is aligning itself with the ever-changing needs of modern businesses.

The integration of Generative AI marks a pivotal milestone in the evolution of Smartsheet, allowing users to harness the power of AI in their daily operations, ultimately leading to enhanced project management, streamlined workflows, and more successful outcomes. As technology continues to advance, Smartsheet is undoubtedly positioning itself as a pioneer in the work execution space, empowering users to work smarter and achieve more.





# Smartsheet AI Features That Enhance Productivity

With the ever-growing demands on teams and resources, leveraging technology to enhance productivity has become a necessity. To stay ahead of the curve, Smartsheet has introduced new AI features designed to streamline workflows and empower users to achieve more in less time.

Here are five specific AI features within the Smartsheet platform that can revolutionize the way you work and supercharge your productivity.



## **AI Solution Builder**

Smartsheet's AI Solution Builder is a game-changer for teams aiming to quickly implement new solution templates. This feature enables users to quickly find Smartsheet templates for their specific use case. The AI Solution Builder can then personalize the template even more to their specific needs, freeing up valuable time for more strategic tasks. Users can say goodbye to manual project templates and focus on higher-level decision-making.



## **Help Assistant**

Smartsheet's Help Assistant Bot offers on-the-spot guidance when users have a question.

It uses Smartsheet's extensive community and help resources to solve complex problems using feedback from other Smartsheet experts. Whether you're setting up a new build, implementing a configuration, or expanding on an existing solution, the Help Assistant can generate formulas based on a simple description of the information you want and provide you with crucial advice.



## **Natural Language Processing (NLP) Search**

Finding relevant information within a vast repository of data can be time-consuming. Enter Smartsheet's NLP Search feature. With NLP, users can simply type their queries in natural language, and the AI will extract the most relevant data and documents. This intuitive search capability eliminates

the need for complex filters and keyword memorization, making information retrieval faster and easier. Time spent on manual search is redirected towards productive tasks.



## Contextual Insights

Understanding the big picture is crucial for effective decision-making. Smartsheet's Contextual Insights feature combines data from various sources and provides actionable insights. By utilizing AI to identify correlations and trends, users can gain deeper understanding and make more informed choices. Whether it's identifying underperforming projects or recognizing successful strategies, this feature enables users to navigate complex data landscapes with ease.



## Brandfolder

Smartsheet's marketing application Brandfolder uses AI and machine learning to automatically organize users' design and branding assets. Users can customize the organizational rules based on file details, like their names or the dates when they were uploaded. Brandfolder can also suggest similar assets and conduct an image search within your library of content, with advanced technology that can differentiate between different models of the same product. The AI scores asset performance and predicts the future performance of new assets to help marketers make decisions about the content they use in various campaigns. This reduces time spent finding assets, adapting assets for one-off requests, etc. Brandfolder can also effortlessly



generate video captions and image descriptions, or easily manipulate images for quick editing. It's one of the most AI-forward add-ons in Smartsheet's roster, embracing automation to improve marketing workflows.



## Working Smarter with AI

Smartsheet's new AI features represent a significant step towards enhancing productivity and efficiency in the workplace. By leveraging AI Solution Builder, Help Assistant, NLP search, contextual insights, and Brandfolder application, users can optimize their workflows, save time, and make more informed decisions. As technology continues to evolve, platforms like Smartsheet are at the forefront of transforming the way we work, helping us achieve more while expending less effort.

## The Latest Smartsheet News & Tips

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If you're looking for more updates on the latest cutting edge technology from Smartsheet, visit our blog at [cloudwaveinc.com/blogs](https://cloudwaveinc.com/blogs).

Our team of in-house Smartsheet experts shares tips to help you maximize the platform to its full potential, news about upcoming Smartsheet features, and thought leadership on the wide variety of use cases for Smartsheet products.

## Our Biggest Smartsheet Success Stories

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Wondering if a custom Smartsheet integration, a new reporting system, or some performance automation could benefit your business? Our case studies from satisfied clients can help you envision better project management and data consolidation with Smartsheet.

Learn more about some of our most significant Smartsheet success stories at [cloudwaveinc.com/smartsheet](https://cloudwaveinc.com/smartsheet).





# Smartsheet Premium Apps Overview

**Calendar, Control Center,  
Data Shuttle, Data Mesh,  
Dynamic View, Pivot**

Smartsheet Premium Apps can empower you to take your workflow to the next level. Let's explore six Smartsheet apps, each designed to enhance specific aspects of your work processes.



## Calendar

Efficient scheduling and task management are vital for successful project execution. The Smartsheet Premium Calendar app is a game-changer in this regard. It seamlessly integrates with your Smartsheet sheets and reports, providing a detailed visual representation of your project timeline.

You can access milestone dates, deadlines, and tasks all in one place. The Premium Calendar app helps you and your team plan, track, and manage tasks more effectively, improving project efficiency.

[Learn more about the Smartsheet Premium Calendar app here.](#)



## Control Center

Centralizing project management and maintaining consistency across multiple projects is a challenge for many organizations. Smartsheet's Control Center app is the solution. With this premium app, you can create standardized project templates, ensuring that all projects follow the same structure.

Automation features streamline workflows, task assignments, and progress tracking. Gain a comprehensive overview of project statuses to make informed decisions and optimize resource allocation.

[Learn more about the Smartsheet Premium Control Center app here.](#)



## Data Shuttle

Efficient data import and export are crucial for maintaining a seamless workflow. Smartsheet's Data Shuttle premium app simplifies these tasks.

Whether you're migrating data from other systems or integrating Smartsheet with external datasets, Data Shuttle streamlines the process. It ensures data accuracy, integrity, and consistency, enabling you to maintain a well-connected and cohesive workflow.

[Learn more about the Smartsheet Premium Data Shuttle app here.](#)



## Data Mesh

Aggregating and maintaining data can be a time consuming process. Smartsheet's Data Mesh premium app caters to organizations with demanding data needs. It provides streamlined means of consolidating data across sheets, allowing for less maintenance, cleaner data, and optimized collaboration.

Data Mesh is a powerful tool for elevated data management and optimizing your workflow.

[Learn more about the Smartsheet Premium Data Mesh app here.](#)



## Dynamic View

Customizing and presenting your Smartsheet data in a user-friendly and interactive manner is made easy with the Dynamic View premium app. This app lets you create dynamic and collaborative views of your data, which can be shared with team members and stakeholders.

Dynamic Views enhance data accessibility and help teams collaborate more effectively.

[Learn more about the Smartsheet Premium Dynamic View app here.](#)



## Pivot

Pivot tables are a powerful tool for data analysis and reporting. Smartsheet's Pivot premium app brings this capability to your work management platform. You can analyze and visualize your data in pivot tables, creating interactive reports to gain deeper insights into your projects and tasks.

Pivot tables simplify complex data analysis, making it accessible to users of all levels.

[Learn more about the Smartsheet Premium Pivot app here.](#)



# What is a Smartsheet Platinum Partner?

As businesses and organizations continue to evolve, the need for efficient project management and collaboration tools has become increasingly essential. Smartsheet has been at the forefront of this digital transformation, helping companies streamline their processes and drive productivity - and their partners are instrumental to that goal. In the world of Smartsheet, the term "Platinum Partner" holds significant value. But what exactly does it mean to be a Smartsheet Platinum Partner?



## **The Role of a Smartsheet Partner**

Smartsheet offers a Partner Program to facilitate the distribution and implementation of its platform. These partners play a crucial role in the Smartsheet ecosystem by offering consulting, integration, training, and support services to organizations looking to harness the full potential of Smartsheet.

Smartsheet has a tiered partner system, with three main levels: Registered, Gold, and Platinum. Each level reflects the partner's expertise, experience, and commitment to delivering top-quality service and support.

## **Understanding Smartsheet Platinum Partners**

A Smartsheet Platinum Partner represents the highest level of partnership within the Smartsheet ecosystem. These partners have demonstrated a deep understanding of the Smartsheet platform and have a proven track record of successful client engagements. Here are some key aspects that define a Smartsheet Platinum Partner.

## **1. Expertise and Certification**

Platinum Partners have a team of highly skilled and certified professionals who are well-versed in Smartsheet's capabilities. They have extensive experience in implementing and customizing Smartsheet solutions to meet the unique needs of their clients.

## **2. Proven Track Record**

To achieve Platinum Partner status, organizations must demonstrate a history of successful Smartsheet implementations. This means consistently delivering projects that meet or exceed client expectations.

## **3. Comprehensive Service Offering**

Platinum Partners offer a wide range of services related to Smartsheet, including consulting, training, integration, and ongoing support. They can help clients with everything from platform setup to creating custom solutions.

## **4. Strategic Relationships**

Platinum Partners often have close relationships with Smartsheet itself. This can mean a preview of upcoming features and direct communication with Smartsheet's team.

## **5. Commitment to Excellence**

Platinum Partners are committed to maintaining their high standards of service. They stay up to date with the latest developments in the Smartsheet platform and continuously invest in training and certification for their team members.



# Benefits of Working with a Smartsheet Platinum Partner

For organizations looking to adopt Smartsheet, partnering with a Smartsheet Platinum Partner offers several advantages:



## Expert Guidance

Platinum Partners can provide expert advice and guidance to help you make the most of the Smartsheet platform.



## Custom Solutions

They can tailor Smartsheet to your specific needs, creating custom solutions to optimize your work processes.



## On-Going Support

Platinum Partners offer ongoing support, ensuring that your custom Smartsheet implementation remains efficient and effective.



## Access to New Features

With their strong relationship with Smartsheet, Platinum Partners often have a preview of upcoming features and updates.



## Proven Results

You can have confidence in their ability to deliver successful Smartsheet projects, based on their track record.

# CloudWave

## A Smartsheet Platinum Partner

A Smartsheet Platinum Partner is a top-tier service provider in the Smartsheet ecosystem. By choosing to work with a Platinum Partner, organizations can access the highest level of expertise, service, and support for implementing Smartsheet to improve their work management processes. This partnership represents a commitment to excellence and a dedication to helping clients achieve their goals using the Smartsheet platform.

If you're considering Smartsheet for project management and data analysis, look for a Smartsheet Platinum Partner like CloudWave who understands the technology best practices and prioritizes your unique business needs.

Through Smartsheet integration, we deliver cross-platform functionality that helps you bring your system together for an end-to-end solution within Smartsheet. Using automation, we reduce tedious manual processes to save time and improve productivity.

CloudWave also provides Smartsheet support throughout the entire project lifecycle - defining scope, architecture, design, development and deployment. As your data environment constantly changes, we offer continued support beyond the project in an ever-shifting digital landscape.

